

Marketing Plan Template

by TFEvans.com

A marketing plan will serve as a guide, usually covering one year, to implement a vision and “how-to” apply marketing and brand principles. It assists in addressing your customers’ requirements and issues.

A marketing plan clearly defines these key items:

- Mission & Vision
- Customer Segment
- Marketplace
- Product or Service
- Sales and Distribution
- Communications Channels & Vehicles
- How-to Measure Success

This template assumes that the user has computer and Microsoft Word skills.

If you have questions about this template please contact
www.TFEvans.com/Contact.html

After saving the contact information, this section should be deleted.

(Insert title of plan)

Insert logo

Insert Company logo

Insert Marketing Plan Title
Issue Date -- Month and Year

Website Sample

(Insert title of plan)

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General Information (optional)

- Preparer Contact Information
Name, Address, Phone Number, Email address
- Executive Contact Information
- Plan Copy Number (if you're controlling distribution)

Website Sample

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G. Action Timeline (optional)	
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B. Legal and Accounting Process	
C. Insurance and Security	
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A. Determine the Marketing Budget Amount	
B. List of Marketing Priorities by Project Name	
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Mission Statement

This statement should be concise and to the point. It should be brief enough that employees can memorize it and always know how their assignment and task connect to the company.

An optional addition to this section can be the company (owner's) Vision Statement.

Executive Summary – A one page summary of the Plan's purpose & results

- Your Company Overview
- Market Opportunity
- Mission and Goals
- Marketing Strategy Summary
- Competitive Analysis
- Company's Competitive Advantage
- Management / Personnel / Vendors
- Financial Projections

Note: The executive summary is written after the completion of the Plan.

The Business Overview.

- Business Goals (No more than three, at a time.)
- Marketing's Role and Responsibility
- Marketing Organization Chart (optional)
- Brand Position (either current or what you want it to be)
- Brand Promise (either current or what you want it to be)
- Brand Traits (either current or what you want it to be)
- Company SWOT Analysis (Strength, Weaknesses, Opportunities and Threats)
- Partnerships and/or Association Memberships (if applicable)

(Insert title of plan)

Insert logo

The Marketing Strategy

The strategy always includes multiple points – *Problem Solving; Product Descriptions; Goals; Objectives; Customer, Market & Competitive Analysis; Sales; Communications and Customer Service.*

A. The Need the Product or Service Solves

The need or requirement must be from a customer or a market void. This can be a simple statement and/or primary or secondary market research showing how your product or service will solve an issue.

B. Product or Service Description

- Product or Service description and if it applies include information on suppliers and availability of materials and fulfillment.
- Product and Product Line Chart with Price Points (optional)

C. Marketing Goals and Objectives

- This will change overtime. To keep it manageable no more than 3 goals and 3 objectives to start.
- What do you want marketing to accomplish? The goal should be broad (i.e., Increase sales.) and the objective should be measurable (i.e., All marketing sales material must be finished in 30 days and increase sales by 4-5%)

D. Customer, Market and Competitive Analysis

– Customer Analysis

- Know your customer! A customer list is nice, but knowing specific demographics about the target audience will help you enhance your product or services, target advertising, etc. Not only the demographics but their geography and psychographics of the audience.

What's the customer's perspective of your product or service

– Market Analysis

- Know the requirements of the market and what you are targeting, i.e., small business, mid-size business, corporations, Fortune 500, manufactures, electronics, beauty, healthcare, etc.
- Approximate Market size and/or Niche

– Competitive Analysis

- Who are the top 3 – 4 competitors (local, regional or national)
- Market Research – do primary or secondary research that applies– most cannot afford primary research, but secondary research is but a click away. Get on the Internet and learn all you can about your competitor, industry, new products, changes in the marketplace, etc.
- Joining a national association can help with the research, as they may have the information.

What's the competitor's perspective of your product or service

(Insert title of plan)

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Contact www.TFEvans.com for the full template.
A consultation session is an additional fee.

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